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Approved by:

David Mergen

U.S. Embassy

Prepared by:

Ken Joseph/MJulia Balbi

Report Highlights:

Argentina has a relatively open trading system with moderate tariffs and reasonably transparent labeling and sanitary requirements. Its market of imported foods and beverages is \$1 billion, with the United States accounting for slightly above 7 percent. Products for direct sale have the best potential followed by food ingredients.

Includes PSD changes: No
Includes Trade Matrix: No
Annual Report
Buenos Aires [AR1], AR

SECTION I. MARKET OVERVIEW

Business Climate

- < In general, Argentina has a relatively open trading system with moderate tariffs (generally, between 12 and 28 percent) although they have been recently increased, and reasonably transparent labeling and sanitary requirements. Nearly all FDA-approved processed foods and beverages are importable.
- < Over the last decade, Argentina has implemented deep and successful economic changes, including controlling inflation, and undertaking trade liberalization, privatization, and public administrative reform, which resulted in a boom in economic growth. A recession affected the country during the past three years but the economy is expected to improve somewhat in 2002.
- < Argentina has the highest per capita GDP in Latin America, projected at \$7,600 for 2001.
- < Consumer prices have increased by less than 1 percent per year since 1996, and are expected to remain flat in 2001.
- < During the past decade, Argentina has experienced good investment growth. Many foreign companies show interest in Argentina as a starting point to focus on the Mercosur region. However, due to the economic difficulties, investment has slowed down significantly.
- < Although overall import regulations and standards are relatively easy to comply with, the GOA occasionally imposes trade barriers. Argentina also applies unjustified phytosanitary import requirements to some U.S. agricultural products, such as Florida citrus, and some California stone fruit, though these are being addressed.
- < Argentina's population in 2001 is estimated at 37.2 million of which only 10 percent lives in rural areas. One third of the country's total population lives in Buenos Aires city and suburbs, and accounts for approximately 50 percent of the country's total consumption.
- < The Argentine peso has been tied to the U.S. dollar on a 1-to-1 basis since 1991 and is expected to remain so for the foreseeable future. However, in June 2001, the government created the "commercial dollar" which is based on the US dollar and the Euro, and fluctuates daily for import and export transactions.
- < Relatively low import tariffs, an open economy and a strong peso have encouraged large imports, including foods and beverages (F&B). F&B imports (including seafood) in 2000 were slightly above \$1 billion which, despite the recession, grew 12 percent from the previous year.

Retail Food Sales

- < Total F&B sales in superstores and supermarkets in 2001 are forecast at \$10 billion. With a moderate economic growth projected for 2002, total F&B sales are expected to grow marginally.
- < F&B imports are expected to experience healthy growth over the next decade.
- < The share of consumer ready food products imported from the US averaged 10.7 percent in 1997-2000. U.S. F&B products are expected to become more popular in the future

due to: 1) the growing demand for convenience foods, 2) the increasing influence of U.S. culture, and 3) a clear advantage on sanitary standards in comparison with European products.

Income Distribution

- < Apart from Buenos Aires, other cities with more than 1 million people are Cordoba, Rosario and Mendoza. These three cities together account for approximately 15 percent of total F&B sales.
- < The upper economic strata account for 10 percent of the country's total population, with an average yearly household income of over \$100,000, and the middle strata account for 36 percent of the total with an average income of \$18,000. The poorer segment represents slightly more than half of the population and has an average yearly income of about \$9,000.
- < The average Argentine family spends approximately 22 percent of its income in foods.
- < Convenience foods are showing great acceptance as a result of more women working outside their homes, and a growing number of single-person homes (17 percent of the total projected for 2001).

Outlook for U.S. Exports of Food & Beverage Products

ADVANTAGES	CHALLENGES
Argentine consumers think of U.S. products as high quality and reliable	Mercosur preferential tariffs encourage inter-regional trade. Brazilian and Chilean competition is strong for many products, supplying a little less than half of Argentine F&B imports
A large number of Argentines travel and study in the U.S., and are exposed to American culture and products	Lack of brand awareness for many imported products by importers, retailers and consumers
Most imported food is specialty and/or novelty in large retail and convenience stores	Lack of importers' and retailers' knowledge about purchasing and merchandising U.S. products
Efficiency, value and variety of U.S. F&B products	Limited market awareness by U.S. exporters of opportunities in Argentina
Increasing demand for convenience foods (including frozen and microwaveable foods)	Relatively small initial purchases by importers, which discourage U.S. suppliers and increase unit costs
Hypermarket and superstore expansion in the interior of the country opens new opportunities to U.S. F&B products	High cost for launching new brands/products and high slotting fees, which exporters and importers must share

Large foreign retail chains have more opportunities to deal with foreign suppliers	Large local supply of many F&B products
Large retailers are importing more products directly	Large foreign investment in the food industry improved efficiency, quality, and competition
A growing local F&B industry opens new opportunities to imported food ingredients	Higher distribution costs to reach interior of the country and smaller cities
Strong local currency makes imported products more accessible to consumers	Local importers perceive lack of flexibility and response from most U.S. exporters.
Greater use of U.S. consolidating companies, which facilitates imports of smaller volumes and a wider variety of products.	
Good local cold chain facilities to allow imports of frozen and chilled products.	
Greater interest of retailers in carrying U.S. F&B.	
Better sanitary status compared to Europe's.	
Greater exposure of local retailers to U.S. exporters and products through FAS activities.	
Improved U.S. labeling and packaging (better accepted locally)	
Registration for F&B imports and import procedures are usually relatively simple	

SECTION II. EXPORTER BUSINESS TIPS

Local Business Customs: Keys to Success in Argentina

- < Appoint a representative, agent or importer.
- < Spanish language in printed materials preferred, even though many businessmen speak English.
- < Display samples.
- < Long-term outlook.
- < Personalized approach.
- < Contact top decision-makers.
- < Consistent attention in service and delivery.
- < Do not take no for an answer - frequent visits and follow-ups.
- < Get a contract in writing.

- < Credit terms. From the time the importer places an order to an exporter to the time he collects payment from retailers, a minimum of 4-5 months can go by.
- < Flexibility in volumes.
- < Protect and register your trademarks.

The Consumer

- < Based on an article published by *Mercado*, Argentine consumers are rational, practical, refined and demanding. Therefore, they want things quicker, easier, healthier, and cheaper.
- < Traditionally, Argentines have been very conservative and highly influenced by Europe.
- < Younger generations (25/30 years old or less) are more open and oriented towards U.S. culture
- < The fast food sector has grown rapidly in the past five years, remaining stable during 2001.
- < There is a clear increasing concern about fats and cholesterol in the diet. As a result, diet, light, skimmed or fat-free food products continue to increase in popularity.
- < The majority of Argentines still adhere to a diet dominated by beef, French fries, salad, and pasta. However, chicken, fish and fruits and vegetables are becoming more popular.
- < Hot and/or spicy foods are not widely popular.
- < Children play an important role in the family's food purchases.
- < Dining out is mainly left for social events during weekends or for business purposes during weekdays.
- < Delivery food is popular (most typically pizza and ice-cream, but also top restaurants provide delivery service).
- < About 45% percent of the middle and upper class families has microwave ovens and 75% percent, freezers.
- < After a long period of absence, ethnic restaurants (Mexican, Thai, Japanese, Hungarian, Persian, Indian, Jewish, Russian, among others) are beginning to flourish in Buenos Aires city.
- < In the past decade, as a result of economic stability and globalization, Argentines have modified their consumption behavior:
 - * greater valuation of time resulting in shopping integration to make the best use of time.
 - * different valuation of money, i.e. with stability, purchases are more rational.
 - * greater demand for services.
 - * greater family integration regarding shopping decisions.
 - * greater consumer acceptance towards change, where global communications (primarily TV) show cultural and consumption habits from other countries, but especially from the United States.

In addition, due to the economic recession, the following consumer trends were noticed during the last year:

- * shopping is carried out more frequently (once or twice a week) due to consumers' lower purchasing power mainly as a consequence of unemployment

and tax increases.

* less loyalty to stores and brands.

* private labels and B-brands are growing in popularity in the Argentine price-driven market. 65% of consumers buys private label and B-brands in the Province of Buenos Aires.

Food Standards and Regulations

- < The Argentine Food Code (Codigo Alimentario Argentino - CAA) regulates local food production and marketing. However, the CAA resolutions are being gradually replaced by Mercosur standards, which are based on the norms of: 1) the European Union; 2) the Codex; and 3) the FDA.
- < There are three official entities in Argentina which regulate food and beverage imports, as follows:

* *Servicio Nacional de Sanidad y Calidad Agroalimentaria - SENASA* - handles fresh, chilled or frozen products and by-products of animal, plant and seafood origin. It also handles canned products of over 60% animal origin and food preparations of over 80% animal origin.

* *Instituto Nacional de Alimentos - INAL* - regulates processed food products which are prepared for direct human consumption, health supplements, and both alcoholic and non-alcoholic beverages, with the exception of wine.

* *Instituto Nacional de Vitivinicultura - INV* - exerts control over wine products.

- < Each entity requires specific documentation to register an imported product. Very few U.S. F&B products have been unable to access this market. However, there are a few products, such as some stone and citrus fruits, which still cannot be imported due to phytosanitary reasons.
- < The local importer/agent has to go through the registration process.

For additional information on this section, please refer to our *Food and Agricultural Import Regulations and Standards report (FAIRS)* (AGR# AR1054), which you can find in the agricultural country report section of the FAS Homepage: www@fas.usda.gov

General Import and Inspection Procedures

- < Before the product is shipped, it must undergo a "pre-shipment inspection" in the country of origin, carried out by an international certification company approved by the Argentine government. This company must compare the merchandise shipped with the price paid for it in order to detect under-invoicing, counter unfair competition and prevent tax evasion. (*Note: This procedure only applies to the agricultural and food products included in the following HTS chapters: 1, 2, 5, 7, 12, 13, 14, and 23*).
- < Products imported through **SENASA** - An approved local importer requests from SENASA an import permit, which will then be submitted to Customs to have the product released.
- < Products imported through **INAL** - Once the importer has obtained the "register number

of food product" (RNPA), and the shipment is in the port, the importer needs to apply at INAL for a "Certificate of Free Circulation" which will be submitted at Customs to have the merchandise released for marketing.

- < Products imported through **INV** - Once the product arrives at the local warehouse, the importer must request an analysis and shipment control by the INV, which will then issue a "Certificate of Free Circulation". After that, the product is ready to be marketed.

When the shipment arrives at Customs, the products are inspected (labels, shelf-life, temperature, etc.) to confirm that the information in their files matches the actual shipment. If everything is correct, the load is released.

For additional information on this section, please refer to our Food and Agricultural Import Regulations and Standards report (FAIRS) (AGR# AR1054), which you can find in the agricultural country report section of the FAS Homepage: www@fas.usda.gov

III. MARKET SECTOR STRUCTURE AND TRENDS

- < Good market opportunities for the three food market sectors in Argentina: retail, HRI (hotel, restaurant, and institutional), and food processing. However, the retail food and food ingredient sectors show the best prospects for the marketing of imported products in the near future.

Retail food sector

- < Roughly 70 percent of Argentina's total F&B sales, and approximately 70 percent of all imported F&B are sold through hypermarkets, superstores, and supermarkets.
- < After saturation of Buenos Aires City and suburbs, large retail chains are quickly expanding to the interior of the country.
- < Many strong international retail companies operate in Argentina (Carrefour, Ahold, Casino, Wal-Mart, Jumbo).
- < Although large supermarkets and supercenters still concentrate a big portion of the retail food and beverage market, smaller supermarkets and warehouse stores (locally called *hard discount* stores) are gradually gaining market share due to 1) proximity, and 2) lower prices rapidly getting closer to promotional prices offered by larger supermarkets. Lately, traditional stores have been gradually regaining a small portion of the market, lost during the past few years to large and more efficient retail stores such as hypermarkets and convenience stores. This is due to the fact that some less affluent consumers resort to the traditional store in their neighborhood for small purchases where the owner usually provides credit.
- < There are excellent opportunities for a wide range of U.S. consumer-ready food products due to their high quality, as long as they meet one or more of the following conditions: 1) they are premium items, 2) they are less expensive than domestically-produced products, 3) they are novelties, or 4) domestic production is smaller than local demand.
- < By 2002, the retail sector is expected to continue showing the following trends: fewer brands, more private labels and B-brands, more products with good value, which could

negatively affect more expensive first brands. Ethnic, kosher, and organic foods are beginning to have some more shelf space.

HRI sector

- < The HRI sector is estimated to account for 15 percent (around \$6,000 billion) of Argentina's total F&B sales, and are expected to comprise approximately 5 percent of the total imports of F&B in 2000.
- < Of the HRI's total imports, U.S. F&B account for about 8 percent.
- < HRI operators usually prefer fresh products over those which are precooked, preserved, frozen or canned. However, they are gradually incorporating consumer-ready food products because of their high quality and easier preparation.
- < One of the primary advantages of U.S. F&B for the HRI sector is their renowned consistently high quality, which is preferred over price in the case of five-star hotels, fancy restaurants, and upscale catering services.
- < Most imported foods and alcoholic beverages for the HRI sector come from Europe due to tradition and the popularity of the Mediterranean cuisine.

Food processing sector

- < In the food processing sector, imports accounted for approximately 15 percent of the total sales of food ingredients in 2000.
- < In the past decade this subsector grew about 25 percent annually, reflecting strong foreign investment in the local food sector. Developments in the past three years have slowed down as a result of the strong economic recession. However, the sector is expected to rebound as soon as the economy turns around.
- < The growing popularity of fast food favors imports of some U.S. food ingredients (such as sauces, specialty meats, frozen French fries, cheese), which are considered of high quality and safe. However, in the past few years there has been a shift toward local or Brazilian products.
- < There will be a higher demand for additives, preservatives, and flavors, of higher quality.
- < Despite the good reputation of U.S. food ingredients in Argentina, they face a strong competition with European products, primarily from Italy, France, England, and Germany, and also from Brazil and Chile.
- < Arrival of U.S. and foreign players to the Argentine food market resulting in industry concentration is expected to foster imports of food ingredients for new product lines.

Market Entry

The best method to import a product will depend upon the product itself, the importer, and retailers. However, virtually all successful trade depends upon the commitment of the exporter to devote the time and resources necessary for building a market for their product(s). In general, imported F&B come into Argentina through any of the following ways:

- Direct imports by supermarkets. Import or purchasing managers of large retail

companies identify good products in international food shows, buying missions, etc. They establish a direct contact with the foreign supplier and import the products directly. Due to small initial volumes, it is common for them to use large wholesalers or consolidators in the U.S.

- Local agents, who work closely with large retail chains usually present new products to purchasing managers in supermarkets. Imports are done on behalf of supermarkets and agents charge a commission (therefore, they do not run any financial risk) but they stay on top of the product to supervise its marketing and brand development.
- Local F&B importers, who import products and then market them in supermarkets and/or HRI establishments. There are a few of these who have been in the market for several years and have well-established brands. They mainly specialize in gourmet foods.
- Local processors (mainly subsidiaries of multinational companies) such as Nestle, Kraft, Pillsbury, Parmalat, etc., who import and distribute products usually manufactured by their sister companies.

Trends in Promotional/Marketing Strategies and Tactics

Market promotion activities by foreign countries consist mainly of: trade missions, supermarket in-store promotions, menu promotions, buying missions, and trade shows.

- While the influence of U.S. culture has fostered the introduction of a wide variety of U.S. products into Argentina, Europe still dominates imports from non-Mercosur countries. However, younger generations are becoming more U.S.-oriented regarding their tastes and habits.
- Several European Union countries, such as Spain, France, Italy, and Germany, have market promotion programs organized by government or quasi-government organizations.
- Promotion by Mercosur countries, primarily Brazil and Chile, tends to be carried out by the private sector.

Trends in Tourism and Internet Sales

- < According to an article published by *Mercado*, over \$3 billion were invested in the Argentine hotel sector during 1991-2001. This sector is expected to grow slightly during 2002 as a result of the expansion of three and four-star hotels throughout the country. Several international chains, such as Best Western, Caesar Park, Sheraton, Accor, Raddison, Four Seasons, Days Inn, NH and Choice Atlantic, have significant expansion projects for next year. In addition, Howard Johnson is planning to launch 17 motels attached to gas stations throughout the country.

- < The current recession obviously affects domestic tourism characterized by oversupply and low occupancy rates. Although Argentina continues to be an expensive destination, an improvement in the economy will reactivate the sector. The Argentine Government considers tourism as one of the key industries to develop.
- < A few retailers provide Internet and phone sales service, and a few others are in the process of developing theirs. However, sales of foods through the web are currently not very popular.

For additional information on this section, please refer to our Retail Food Sector report (AGR# AR1054), which you can find in the agricultural country report section of the FAS Homepage: www@fas.usda.gov

SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS

This section is divided into three categories:

a) Products which already exist in the market and have good potential, and products which are just starting to be developed and also show good prospects:

- * Frozen foods - this category has been growing at high rates in the past years. There is domestic and regional (especially Chilean) supply, especially of raw vegetables. Good trend in higher-value frozen products of good quality, such as prepared meals.

- * Ethnic foods - globalization, tourism, and the rapid expansion of ethnic restaurants in Buenos Aires City are providing retailers an increased demand for these types of products. Thai, Hindu, Korean, Japanese, Chinese, Mexican, Kosher, etc. are a few examples of this trend. The United States has good potential for the supply of these products as the product and its packaging are "westernized".

- * Ready-prepared dry foods - have good market potential, but the price and quality have to be good (e.g. dry pasta with sauces, flavored rice, etc.).

- * Health foods - vitamins, dietary supplements, isotonic beverages, etc. are products with good potential (e.g. granola bars).

- * Seafood - niche market, but great interest in frozen (and some chilled) shrimps, salmon, clams, lobster

b) Imported F&B considered "commodities" (products whose domestic production is not sufficient to satisfy local demand. These basically compete based on price):

- * Palm hearts

- * Pork, frozen

- | | |
|---------------------|--------------------|
| * Canned pineapple | * Cocoa |
| * Canned vegetables | * Tomato preserves |
| * Canned tuna | * Raw nuts |
| * Coffee | * Pepper |

c) Imported "classic" products (F&B which are in the market and will continue to be). Growth will depend on the evolution of the country's economic situation, tastes, and population growth:

- | | |
|----------------------|-------------------------------|
| * Wines/Beer/Whisky | * Chocolate |
| * Snack foods | * Fruit and vegetable juices |
| * Cookies | * Pasta |
| * Breakfast cereals | * Confectionery products |
| * Jams/Marmalades | * Fine soft specialty cheeses |
| * Ham/some cold cuts | * Sauces |

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

Government Regulatory Agencies

Servicio Nacional de Sanidad y Calidad Agroalimentaria (SENASA)

Avda. Paseo Colón 367, piso 9
1063 Buenos Aires, Argentina
Tel: (54-11) 4331-6041/6049
Fax: (54-11) 4342-1628

Instituto Nacional de Alimentos (INAL)

Estados Unidos 25
1101 Buenos Aires, Argentina
Tel: (54-11) 4340-0800
Fax: (54-11) 4331-6418
Website: www.anmat.gov.ar

Instituto Nacional de Vitivinicultura (INV)

San Martín 430

5500 Mendoza, Argentina
Tel: (54-261) 4496301; 4496359
Fax: (54-261) 4496306
E-mail: dirnac@inv.gov.ar

Office of Agricultural Affairs
U.S. Embassy, Buenos Aires
Avda. Colombia 4300
C1425GMN Buenos Aires, Argentina

Phone: 54-11-5777-4844
Fax: 54-11-5777-4216
E-mail: agbuenosaires@fas.usda.gov
Homepage: <http://www.fas.usda.gov>

APPENDIX I. STATISTICS**A. KEY TRADE & DEMOGRAPHIC INFORMATION**

Agricultural Imports from All Countries (\$Mil) / U.S. Market Share (%) 2000	\$1,329 /10.0%
Consumer Food Imports From All Countries (\$Mil) / U.S. Market Share (%) 2000	\$1,015/5%
Edible Fishery Imports From All Countries (\$Mil) / U.S. Market Share (%) 2000	\$33 /1%
Total Population (Millions)/Annual Growth Rate (%) 2001	37.4 / 1.2
Urban Population (Millions)/Annual Growth Rate (%)	33.7 / NA
Number of Major Metropolitan Areas	4
Size of the Middle Class (Millions)/Growth Rate (%) (*)	13.5 / NA
Per Capita Gross Domestic Product (U.S. Dollars) 2001	\$7,600
Unemployment Rate (%) 2001	17.0%
Per Capita Food Expenditures (U.S. Dollars) 2001	\$1,200
Percent of Female Population Employed 2001	14.0%
Exchange Rate (US\$1 = 1 Argentine Peso)	US\$1 = 1 Arg. Peso

(*) Characteristics: Completed high school, administrative employees, average home income \$20,000/year, half of them has a car and credit card.

B. CONSUMER FOOD AND EDIBLE FISHERY PRODUCT IMPORTS

Argentina Imports	Imports from the World			Imports from the U.S.			U.S Market Share		
(In Millions of Dollars)	1997	1998	1999	1997	1998	1999	1997	1998	1999
CONSUMER-ORIENTED AGRICULTURAL TOTAL	899	970	874	99	91	82	11	9	9
Snack Foods (Excl. Nuts)	68	72	75	7	3	2	10	5	3
Breakfast Cereals & Pancake Mix	10	12	10	2	2	3	20	16	25
Red Meats, Fresh/Chilled/Frozen	105	145	88	4	7	4	4	5	5
Red Meats, Prepared/Preserved	50	54	57	2	1	1	3	2	2
Poultry Meat	58	71	53	1	1	1	0	0	0
Dairy Products (Excl. Cheese)	49	35	19	2	2	3	5	6	16
Cheese	19	21	24	3	5	4	18	22	16
Eggs & Products	9	12	5	1	1	1	4	4	9
Fresh Fruit	114	119	124	3	1	1	3	1	0
Fresh Vegetables	7	12	26	1	1	1	15	10	5
Processed Fruit & Vegetables	127	134	126	8	11	13	6	8	10
Fruit & Vegetable Juices	14	18	18	2	1	1	16	6	4
Tree Nuts	23	21	18	6	5	3	26	22	14
Wine & Beer	46	47	42	5	3	2	10	7	5
Nursery Products & Cut Flowers	18	19	18	1	1	1	7	3	4
Pet Foods (Dog & Cat Food)	27	19	21	18	14	12	67	71	57
Other Consumer-Oriented Products	156	159	149	34	33	31	22	21	21
FISH & SEAFOOD PRODUCTS	87	86	88	1	1	1	0	0	1
Salmon	5	6	7	1	1	1	0	0	0
Surimi	1	1	1	0	0	0	0	0	0
Crustaceans	11	12	13	1	1	1	0	1	0
Groundfish & Flatfish	2	3	2	1	0	1	1	0	0

Molluscs	9	7	6	1	1	1	1	0	2
Other Fishery Products	60	57	59	1	1	1	0	0	1
AGRICULTURAL PRODUCTS TOTAL	1,770	1,700	1,376	346	250	178	20	15	13
AGRICULTURAL, FISH & FORESTRY TOTAL	2,007	1,958	1,609	354	259	185	18	13	12
Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office									

C. TOP 15 SUPPLIERS OF CONSUMER FOODS AND EDIBLE FISHERY PRODUCTS

CONSUMER-ORIENTED AGRICULTURAL TOTAL - 400				FISH & SEAFOOD PRODUCTS - 700			
Argentina	Import	Import	Import	Argentina	Import	Import	Import
	1,997	1,998	1,999		1,997	1,998	1,999
	Value	Value	Value		Value	Value	Value
	1000\$	1000\$	1000\$		1000\$	1000\$	1000\$
Brazil	262,762	282,108	270,334	Chile	16,744	21,897	20,491
Chile	128,433	139,091	125,002	Thailand	21,381	20,296	22,910
Ecuador	80,070	80,645	83,869	Brazil	14,101	14,967	11,634
Uruguay	44,418	79,677	50,503	Ecuador	15,084	11,200	14,807
Spain	37,052	45,880	43,200	Spain	9,143	7,622	6,444
Italy	39,729	35,722	30,100	Norway	1,781	1,775	1,934
France	22,300	29,596	29,865	Uruguay	1,489	1,655	2,484
Denmark	16,415	17,351	18,619	Germany	1,197	1,198	645
Germany	15,981	15,989	14,218	Iceland	545	838	338
Mexico	15,060	15,902	9,845	Morocco	846	770	591
Netherlands	13,589	15,382	14,411	Netherlands	494	416	606
Areas NES	8,084	7,985	9,833	Peru	69	114	1,875
Thailand	6,940	6,642	9,134	Mexico	1,770	205	469
Indonesia	5,560	4,392	7,034	Venezuela	739	287	305
Other	103,703	102,632	76,610	Other	1,867	2,477	2,105
United States	98,655	90,660	81,809	United States	238	310	494
World	898,798	969,680	874,448	World	87,484	86,039	88,130